

Article

Volunteering - putting your skills into practice

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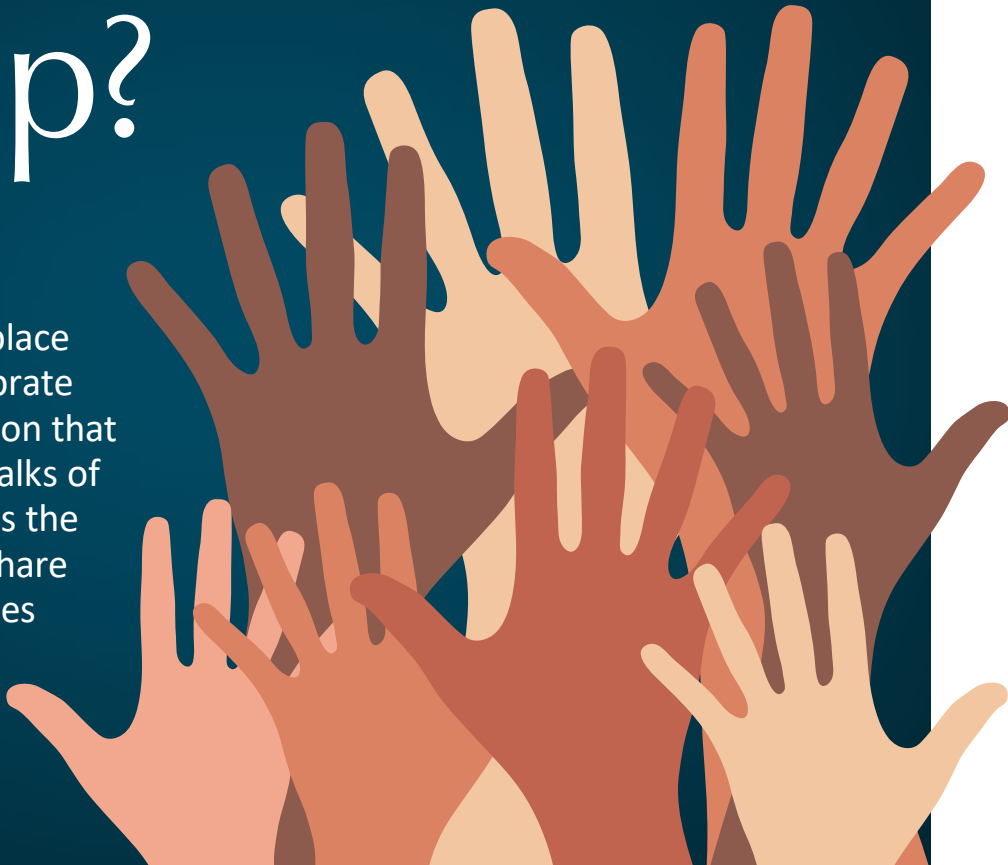
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Do you want to help?

Volunteers Week takes place from 1 to 7 June to celebrate the invaluable contribution that volunteers make in all walks of life. *Tax Adviser* examines the different ways you can share your skills and experiences



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MY EXPERIENCES ON THE ATT COUNCIL

Richard Freeman
Senior Tax Professional at HMRC



As a member of Council of the ATT, I'd like to share a few of my thoughts around my (positive!) experiences of volunteering for both ATT and CIOT.

I started volunteering for my local branch of both organisations, through involvement in my local branch – West Midlands – to get to know fellow members of the tax profession across all sectors and professions. Through organising numerous educational and social events, our committee worked well together and enabled many people to both keep up to date with CPD and build really strong networks.

I enjoyed chairing the branch for a number of years, and continue to act as chair of my current branch – HMRC. In 2015, I joined ATT Council and have sat

on various steering groups in that time. Being part of this group is personally really satisfying. The ability to utilise and develop further skills is fantastic.

I'm currently chair of our nominations committee, looking to appoint further candidates to Council – a great opportunity to ensure we attract candidates who can bring their skills to assist in the successful running of the organisation.

Over the course of my many years of volunteering, I've met many people and enjoyed being an integral part of the diverse tax community we have in the UK. There are endless opportunities to add value and feel valued, both helping the organisation for whom you are volunteering, and also helping you to practise and develop other skills which are transferable to your day job. I would most definitely recommend any of you to consider how to get involved. Saying yes to opportunities is always a great way to learn and develop!

In 2020, there were at least 681 volunteers across CIOT and ATT Committees, Steering Groups and Councils who contributed at least 19,719 hours of their time. We are continually looking for volunteers to contribute to the success of the organisations.

If you want to help to shape the future of the CIOT or ATT and the tax profession, volunteering is a way to make a real difference.

CIOT and ATT's Council, Steering Groups and Committees and the branch network are all run by our members – volunteers who offer their time and expertise to provide essential direction, leadership, guidance and support to the organisations.

Volunteering is a great way to enhance and develop new skills, gain valuable experience and make a contribution to the wider profession, government and public as a whole.

Whether you are a student, newly qualified, a longstanding member or retired, it's never too early or too late in your career to volunteer. We have exciting

opportunities for you to join our Branch and National Steering Groups, Council and Committees.

What does being a volunteer mean?

We offer a wide range of opportunities to suit all levels of skills and experience, both in the Branch network and Steering Groups and Committees of Council. The role and level of personal commitment will vary according to the activity and your other commitments but you should be prepared to:

- Attend meetings and contribute to the work of whichever Steering Group or Committee you join. Most of our Committees and Steering Groups meet four times a year at our Head Office in London but increasingly we are making use of online facilities.
- Contribute to the development of the group's activities by offering professional comment and advice on current issues and developments from your own perspective and sharing practical experiences.
- Read meeting papers in advance of meetings.

Benefits of volunteering

Volunteering has many benefits, both personal and professional. These include:

- gaining new skills and valuable experience;
- opportunities to establish professional relationships with the tax authorities and government departments;
- opportunities to exchange views and experiences with fellow tax professionals, further developing your personal and professional networks;
- early access to information on key developments and innovations in the field of taxation;
- excellent additional material for your CV; and
- opportunities for continuing professional development.

Next steps

Details of our Steering Groups and Committees are on our websites at www.tax.org.uk/networking and www.att.org.uk/about-us/steering-groups-committees

If you are interested in getting involved, please contact Jane Ashton (ATT) at jashton@att.org.uk or Emma Barklamb (CIOT) at ebarklamb@ciot.org.uk, who will give you any further information you need.

Once you know more and are happy with the commitment you will need to make, we will ask you to submit a brief CV so that we can learn a little more about you before we invite you to attend a meeting.

We look forward to hearing from you!

SUPPORTING TAX CHARITIES

Alice Devitt, Director of Fundraising at TaxAid and Tax Help for Older People, shares the benefits of getting involved with their valuable work.

As part of our Volunteers' Week celebrations, we want to recognise the extraordinary contribution made by tax professionals who volunteer. Expert volunteers enable TaxAid and Tax Help for Older People to reach thousands of vulnerable people with tax crises. Two tax professionals who

have volunteered for us explain why they volunteer and why they think it's important.

TaxAid offers free, confidential advice on tax to those on low incomes and Tax Help for Older People provides free, independent and expert help and advice for older people on lower incomes. If you would like to learn more about their work, or find out how you can volunteer, please contact Alice at bridgethegap@taxvol.org.uk.



Jill Crawley

Jill volunteers for Tax Help for Older People. She is originally from Essex but went to university in Manchester and didn't 'go home'. She now lives in Marple, Cheshire with her husband. They both work in the accountancy profession but actually met playing badminton.

I am a Chartered Accountant and Chartered Tax Advisor. I gained a wide variety of accounting and tax knowledge whilst employed by Big Four firms in Manchester. My focus, now that I run my own accounting and tax practice, is on owner managed companies and individual taxpayers.

I noticed an advertisement for volunteers to help at Tax Help for Older People in the technical press about 20 years ago and applied to become a volunteer. I had helped my parents with their tax affairs for a number of years and felt I should give something back to society and make use of my expertise.

I have a real sense of achievement and satisfaction when the clients I see are given impartial and practical assistance to resolve their tax issues. For so many, the burden of dealing with tax matters causes them to worry, and lifting that burden is really worthwhile.

Most of the problems arise from multiple sources of income, multiple tax codes, foreign pensions, brown envelope phobia and having to deal with such issues on an infrequent basis with little knowledge. I often deal with a widow or widower whose spouse had dealt with all the family's financial matters, so they are faced with both a knowledge and emotional challenge.

Impartial and compassionate advice is needed by older people who often had been taxed under PAYE. All of a sudden, in retirement they are faced with strange tax codes for pensions and no one to really ask, as any support that was given during employment has ceased in retirement.

If you enjoy working in tax, interacting with people and have time to spare 'off the clock' you will be amazed how much you learn and the peace of mind you give to those that need Tax Help for Older People.



Chris Moody

Chris volunteers for TaxAid. He trained and qualified as a chartered accountant many years ago with Spicer & Pegler (now Deloitte) and also took the CIOT exams. He lives in the Thames valley with his wife and a number of cats. He recently became a grandfather for the fourth time.

I first became a volunteer adviser at TaxAid 19 years ago when I was self-employed. I had always found the training that TaxAid offered very good value and I approached someone at a conference.

Our volunteer work gives us all a great sense of satisfaction when we can help someone to resolve a tax issue. Among other things, we're often called upon to help with situations where there is a backlog of tax returns

to submit where the client has buried their head in the sand.

TaxAid is needed because the tax system is so wretchedly complicated. Increasingly, computers are taking over and I often struggle with the technology, as well as the law – even though I'm supposed to be an expert.

I would recommend anyone thinking of using their tax skills to volunteer to go for it. It is so rewarding.

Putting your skills into practice

Amy Lawton and David Massey
explain how a team of students and
tax professional volunteers ran a tax
clinic to provide community support



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When we last wrote about the North West Tax Clinic (NWTCL) in *Tax Adviser* ('Opening our doors', October 2020), we were about to welcome a team of tax professional volunteers to support our students and their low-income clients. This was following a successful pilot of the project, between January and March 2020, where a small team of students from Lancaster University and the University of Central Lancashire helped to save taxpayers over £15,000 in tax repayments and waived penalties.

The NWTCL ran again for the full 2020/21 academic year but we needed help. Clinic meetings are held with students from the universities, supervised by qualified tax professionals. They can assist clients with:

- completing their self-assessment tax returns;
- appealing against penalties for tax returns filed late;
- explaining PAYE codes and assisting clients to get them changed if they are incorrect;
- explaining tax calculations from HMRC and appealing against these if they are incorrect; and
- asking HMRC to cancel tax returns it has issued if clients do not meet the requirements to complete a tax return.

Our call for volunteers was met with positivity from the tax profession and the clinic is now supported by six professional tax advisers. The University of Manchester joined the NWTCL in February 2021.

Our goal

Our professional and student volunteers have handled a variety of cases. Our clients are on a low-income and are quite often struggling with other things in their lives as well. To many of them, HMRC is a daunting prospect. The NWTCL helps to demystify their tax obligations and liaise with HMRC on their behalf. The aim is to set them straight with their taxes and empower them to manage their own tax affairs in the future. Common client issues include PAYE tax codes, removing clients from the self-assessment system, and appealing penalties.

During 2020/21, our volunteers once again saved clients thousands of pounds in waived penalties and refunded tax, while also helping those who owed tax complete their returns to get their affairs up to date and guiding others through the SEISS rules.

Benefits of volunteering

Both our students and professional volunteers accomplished a lot during their time with the NWTCL. For the students, having professional tax advisers to supervise their work is invaluable. They not only experienced the tax issues of real-life clients, but also had the opportunity to talk to professionals with years of experience in the field.

Our professional volunteers were exposed to tax issues that are a world apart from the fee-paying client and they gained experience of managing the students.

Here are the experiences of just some of our volunteers:

'I really enjoyed my time volunteering for the NWTCL. I worked with a number of talented students who really showed an interest in the cases brought to the clinic and we managed to get some great results for the clients. It was great to be involved in the programme over the last 12 months and I hope to be involved again in the future.'

Sophie Chamberlain, Senior Manager, ETC Tax

'The students have shown a great deal of technical ability, tenacity and patience in dealing with their cases. I was beginning to wonder if it was a real scenario as so many obstacles were thrown in their way! Those skills will serve them well in whatever they do in the future. Hopefully, they will get an understanding that "real world" tax isn't about numbers, tax cases and right answers. It requires a flexible and open-minded approach backed up with a dash of common sense.'

Peter Bean, Director, PB Taxation Services

'It has been fantastic to be part of a project which gives back to our local community and supports the development of students.'

Simone Brown, Tax Manager, Rotherham Taylor Accountants

We would like to thank those volunteers (and Thomas Slipanczewski and McCloud Ng'onga) for the time they have given to the NWTC, as well as to Gail Mackie and her colleagues at TaxAid who have sponsored the NWTC and provided invaluable support to us.

The NWTC will run again this October. The project has grown, and the Scottish Tax Clinic plans to start at the same time (based in the University of Edinburgh). We hope that the growing tax clinics will be able to provide pro bono income tax advice to more people, and so give back to both our communities and our students.

If you would be interested in volunteering your time, please email alawton@ed.ac.uk (Scottish Tax Clinic) and diamassey@uclan.ac.uk (NWTC).

PROFILE



Name: Dr Amy Lawton

Position: Lecturer in Tax Law

Employer: University of Edinburgh

Email: alawton@ed.ac.uk

Profile: Amy is the co-founder of the North West Tax Clinic, the first student-led tax clinic in the UK. Amy's research interests lie in environmental taxation and tax education. In particular, she is interested in how taxpayers understand and respond to taxation; as well as how to bring innovative forms of tax education to Higher Education.



Name: David Massey

Position: Lecturer in Taxation

Employer: University of Central Lancashire

Email: DIAMassey@uclan.ac.uk

Profile: David joined the Inland Revenue as a Tax Officer (Higher Grade) in 1986. He worked as an investigator examining the accounts of small and medium-sized businesses and as a technical inspector dealing with the personal tax affairs of the members of the 'Big 4' accountancy firms and the 'Magic Circle' of City solicitors. He is now an independent tax adviser and part-time lecturer and researcher.

OTHER ROUTES TO VOLUNTEERING

Georgiana Head takes a look at some other ways you can use your skills and volunteer in the community.



I started my stint volunteering in schools as a school governor for a secondary school in Halifax. In 2019, I was asked whether I would chair a new governing body for a

school in the same multi-academy trust called Trinity Academy Sowerby Bridge.

Trinity Sowerby Bridge had joined the trust in 2018 – and had previously been a failing school which had been put in special measures. By 2019, it had become one of the most transformed academy schools in the UK (among the top 1% of improved schools and one of the highest performing schools for progress in the Calderdale Local Authority). This was no mean feat when the school's catchment area is mainly from the lowest 3% of poverty in the UK. The key to the transformation is the aspiration of all the staff towards the pupils and their outcomes. They say it is about doing simple things well, all the time.

I've found that I have really bought into the ethos of the school. I'm proud of the governing board that we have grown and the work it does, including link governor visits, helping with 'last chance' turnaround meetings to try and get pupils off the track to exclusion (what we used to call expulsion), and formal exclusion meetings.

I've gained HR experience, employment law knowledge, a deeper understanding of risk management, safeguarding and Covid-19 safety

and have learned a raft of education speak. I've also picked up some Slovak language skills to speak to Roma parents and buffed off my old finance skills to read and question budgets.

Although it has required considerable time commitment, it has been a deeply enjoyable experience. I've also found that the skills I have learned around chairing meetings and understanding how an educational establishment works has helped me in my other volunteering roles with ATT.

I would heartily recommend becoming a governor to any tax professional. Your day to day work skills – such as being able to analyse reports, read legislation and read accounts – make you highly valuable to schools. You may, though, spend several months bemused by educational acronyms (we now give new governors a crib sheet of common abbreviations in education).

A very topical undertaking

I think volunteering is a hot topic at the moment because of the hoards of people helping with the Covid-19 vaccination programme. When I had my first vaccination, I came out feeling rather misty eyed at seeing how well run and slick the set up was and how enthusiastic the volunteers were.

I talked to Angela Ferguson, an employment taxes director at Saffery Champness who is a volunteer vaccinator. She was asked to participate having completed a St John Ambulance first aid course. As she explained: 'I looked at the different roles on offer and decided to train as a vaccinator, which meant a lot of online medical training and a day's face to face training practising on artificial arms on a Saturday in January.'

On 26 February 2021, Angela undertook her very first shift at Chester racecourse. 'I was amongst medical professionals and other volunteers from St John's and the Fire Service. I was a little nervous but had an amazing nurse to help demonstrate and run through all the tasks and forms, and then she watched me vaccinate my first five people. The operation of the venue was fantastic, very slick and most importantly safe. And the excitement of most of the over 60s we were vaccinating was amazing to see. They were thrilled to be getting the chance to get back to some kind of normality.'

Angela added that it was 'was lovely to get out of the house and actually see and help people. It has been one of the most rewarding experiences I've had.' She looks forward to every shift and vaccinates some 65 people at a time.

How you can benefit

Volunteering enables you to use the skills you learn at work in a new way. It also helps you to gain new skills which you can transfer to your career. For me, most importantly, it gives the satisfaction of being able to give back to your community. As a recruiter, I can also assure you that it looks good on your CV.

If anyone in West Yorkshire wants to hear about opportunities on school boards, we are always looking for more governors. You can email me at georgiana@ghrtax.com.

Georgiana Head is a Director at Georgiana Head Recruitment specialising in recruiting tax professionals. She trained in tax and is an ATT Council Member. In her spare time she is a school governor.